BRIOCEAN

July 2025

Monthly Market Updates

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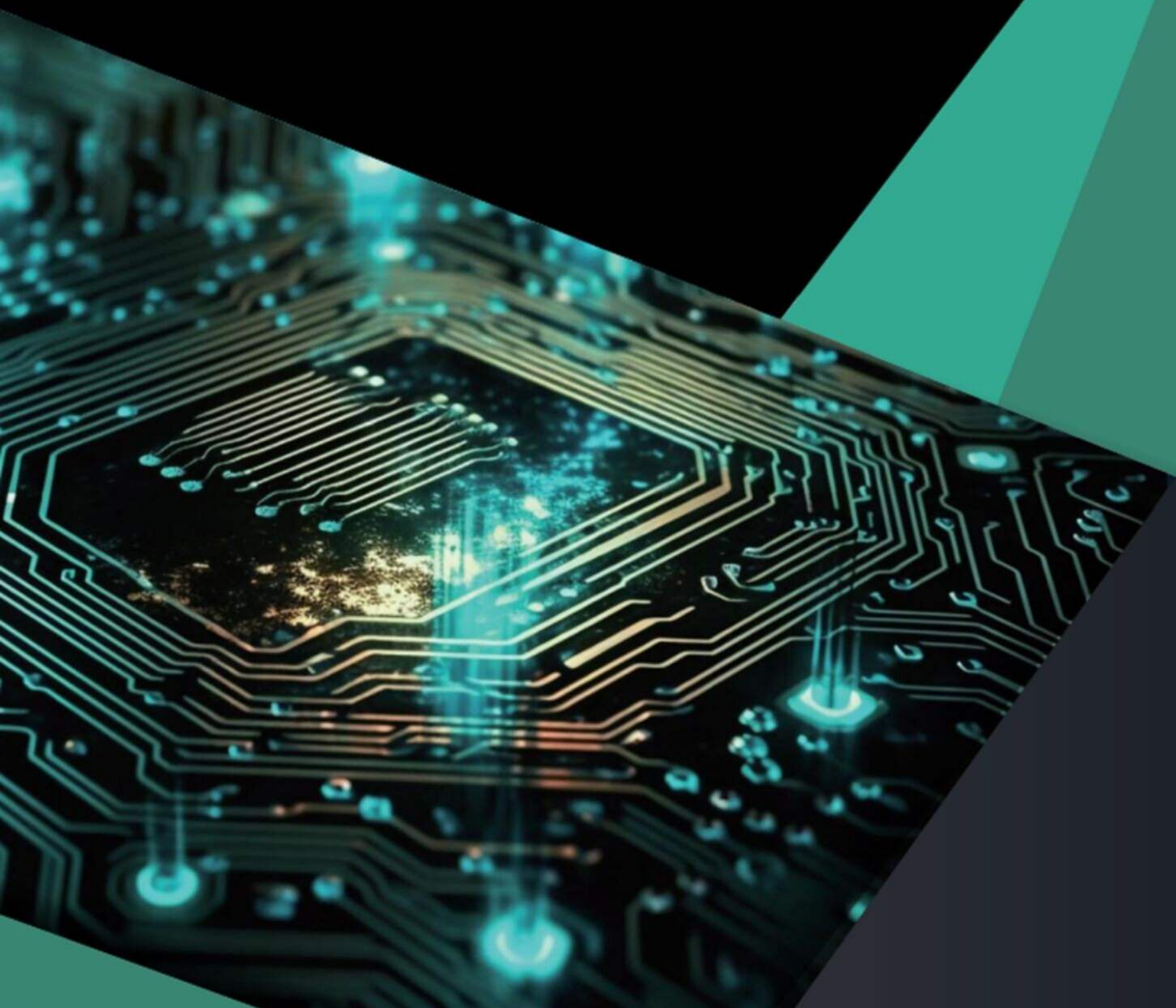

About Briocean

Briocean was established in 2008 as ISO9001:2005, and ANSI/ESD S20.20-2021 certified leading independent electronic component distributor, with our headquarters in Singapore. Our company specialises in sourcing and supply chain management services for the electronic manufacturing clients across a broad range of industries.

Our global network of over 10,000 vetted suppliers allows us to respond to the unique needs of our clients, from reducing component shortages to achieving significant cost savings. Our robust supplier management system and two state-of-the-art quality assurance centres in Shenzhen and Hong Kong ensure that we deliver reliable, traceable procurement services.

At Briocean, quality is our cornerstone. Our commitment is to ensure that every component we source is of the highest quality.

Summary

Category	Trend
Macroeconomics	- U.S. and EU finalise semiconductor trade framework, tariffs set at 15% - U.S. eases export restrictions on some NVIDIA AI chips to China - U.S. eases EDA software export restrictions to China - U.S. and China to hold Stockholm trade talks, focus on tariffs and other issues - Japan and South Korea drive semiconductor resurgence with AI-focused investments
Industry	- NVIDIA & AMD: U.S. approval of H20 GPU and MI308 AI chip sales to China, easing China's arithmetic shortage - Micron, SK Hynix, Samsung: HBM price war and DDR4 shutdown pressure - Broadcom's shares fell by 3.34% on July 22nd, impacted by VMware's maintenance and partner programme adjustments - Texas Instruments lowered its Q3 revenue guidance for the 2025 fiscal year. Q3 revenue guidance for fiscal year 2025, shares plummeted more than 11% after hours - TSMC Q2 net profit jumped 61% year-on-year, 2nm process 2025H2 mass production, monthly production capacity expanded to 100,000 tablets in 2026 - STMicroelectronics acquisition of NXP's sensor business: counter-cyclical investment and strategic adjustment - Microchip Technology and Delta Electronics signed a SiC cooperation agreement - Renesas Electronics launched a new type of 650V/1200V SiC Schottky diode - Marvell and TSMC to cooperate in the development of the following 3nm AI custom ASIC and silicon photonics technology - Changxin storage: China's rise in the power of storage, and gradually challenge the global storage market - SK Hynix 2025 Q1 DRAM sales first exceeded Samsung, released HBM4/HBM4E plan - Samsung Electronics breaks through the threshold of the sixth generation of 10nm-class DRAM yields, plans to mass-produce the sixth generation of HBM4 in the second half of the year

Category	Trend
End-market	- Artificial Intelligence: Intel announced global layoffs and called off two 10 billion wafer fabs in Germany and Poland; OpenAI Teams Up with Oracle to Develop $15 Billion “Stargate” Data Center; Huawei Cloud released Pangu Big Model 5.5 and set up a 150 million ecological incentive fund - New energy: Tesla invested 4 billion yuan to build its first grid-side energy storage power station in China; Ningde Times factory-in-factory model landed in Chongqing, designed to ask the world to provide power battery - Consumer electronics: Apple's layout of the Saudi Arabian market, the first offline retail shop opening next year; Yu Shu technology submitted to the listing counselling materials, to be sprinted "quadrupedal robots first shares" - Industrial electronics: Schneider Electric's AI innovation lab in Beijing Yizhuang opened, China is its only global R&D base for all business lines. - Automotive electronics: Volkswagen invested another 2.5 billion euros, Hefei base into a "global flagship electric car factory". - Communication electronics: China Telecom invested 2 billion yuan to complete the first phase of Poyang Lake Intelligent Computing Centre, 300P computing power will soon be available to the public; China Mobile and GTI released the world's first 6G open test device, the first batch of more than 30 industry-academia-research institutes settled in. - Medical Electronics: Jetmax BMI Acquires Monogram Technologies for $177 Million, Increases Layout of Surgical Robotics
Component Pricing & Product Insights	- Memory chips: DRAM prices surged higher across the board, DDR4 hit the decade's largest single-month increase - GPU: AI demand drives advanced capacity expansion, NVIDIA occupies over 70% of industry capacity - MCU: New energy vehicles and other areas of demand growth, automotive-grade MCU chip prices rose in short supply

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Macro Environment Overview

1. Macro Environment Overview

1.1 Industry Policy

1.1.1 U.S. and EU Finalise Semiconductor Trade Framework, Tariffs Set at 15%

On July 27, the United States and the European Union announced a significant trade framework agreement, aimed at stabilising transatlantic economic relations and averting a looming 1 August deadline for higher U.S. tariffs. A central element of this agreement is the restructuring of tariffs within the semiconductor sector, among other goods.

Under the new terms, the vast majority of EU goods entering the U.S. will now be subject to a 15% benchmark tariff. This represents a substantial reduction from the 30% tariffs previously threatened by the U.S. administration, though it is still higher than historical pre-2024 rates. While the 15% rate broadly applies, specific final tariffs for the chip and pharmaceutical industries, which are currently under separate Section 232 investigations by the U.S. Department of Commerce, are still awaiting a definitive U.S. announcement within two weeks.

Crucially, the agreement stipulates that both the U.S. and the EU will implement zero tariffs on semiconductor manufacturing equipment and certain critical raw materials, along with other strategic products like aircraft components and specific chemicals. This provision is expected to benefit key players like ASML.

In return, the EU has committed to strategic purchases totaling USD 750 billion (including liquefied natural gas, oil, nuclear fuel, and semiconductors) from the U.S. over the next three years. Additionally, the EU will encourage European companies to invest USD 600 billion in the United States, including in advanced manufacturing and critical materials, over the course of the current U.S. presidential term. The deal also includes an agreement to open discussions on converting existing 50% tariffs on European steel and aluminum into a quota-based system.

This agreement is largely seen as a move to de-escalate transatlantic trade tensions, bringing a degree of stability and predictability to affected industries, particularly the semiconductor sector. Despite some European concerns over the asymmetry of the deal and the burden of the 15% tariff, the overall accord signals a clear commitment from both sides to pursue cooperation and reciprocity in key technological and economic sectors, while avoiding a full-blown trade war.

1.1.2 U.S. Lifts Restrictions on Nvidia AI Chip Exports to China

In a notable development directly impacting the high-performance computing segment of the semiconductor industry, the U.S. government rescinded certain restrictions on the export of advanced AI chips, specifically Nvidia's H20 processors and AMD's MI308 processors, to China. This reversal, made public on July 16, 2025, was explicitly framed by Commerce Secretary Howard Lutnick as a strategic "quid pro quo" tied to broader negotiations over rare earth materials, stating, "We put that in the trade deal with the magnets".

This decision is poised to significantly bolster revenue for American chip manufacturers. Nvidia, for instance, had faced substantial financial setbacks due to previous export suspensions, including a reported USD 4.5 billion inventory valuation loss for H20 chips in Q1 2025 and effectively zero H20 sales to China in Q2 2025. Analysts now project H20 chip sales could contribute substantially to its data centre segment's revenue in the latter half of 2025. For China, renewed access to these "green-zone" AI chips, while not representing the absolute bleeding edge of technology, restores vital compute power, enabling Chinese firms to continue their progress in AI model training and deployment.

This pragmatic policy adjustment by the U.S. reflects a strategic balancing act, aiming to mitigate economic losses for American technology companies and secure access to critical rare earth supplies, while maintaining some level of control over the most advanced technological capabilities.

1.1.3 Relaxation of EDA Software Export Curbs

As part of the ongoing de-escalation in trade tensions, the U.S. also lifted restrictions on exports to China for Electronic Design Automation (EDA) software developers on July 3, 2025. This move was widely interpreted as a further sign of easing tensions and a direct response to Beijing's rare earth concessions. Companies such as Siemens have reportedly resumed sales and support for their Chinese clientele, following a period of restricted engagement.

EDA software represents a crucial chokepoint in the semiconductor manufacturing process, essential for designing complex integrated circuits, including those for cutting-edge AI and 5G applications. The swift reversal of these restrictions, which had been imposed in May 2025, underscores how economic interdependence can limit the sustainability of stringent tech export controls. U.S. and European firms dominate the global EDA market, including a significant share of China's market (estimated at over 70%), meaning prolonged bans threatened substantial revenue streams for major EDA vendors like Synopsys and Cadence Design Systems. The lifting of these curbs is expected to drive a "snapback" in Q3 2025 revenue for EDA firms, signaling a prioritisation of economic stability alongside strategic objectives in this critical technology segment.

1.1.4 Upcoming Stockholm Trade Talks (July 27-30, 2025)

A major diplomatic focus in mid-to-late July has been the impending third round of high-level economic and trade talks between the U.S. and China, scheduled to take place in Stockholm, Sweden, from July 27-30. U.S. Treasury Secretary Scott Bessent has confirmed his attendance and intention to meet with his Chinese counterpart, Vice Premier He Lifeng. A central objective of these discussions is to work towards a "likely extension" of the August 12 deadline for tariffs to snap back to steeper. Beyond tariffs, Secretary Bessent has indicated a broader agenda that may include concerns over Chinese industrial overcapacity, Beijing's purchases of Iranian and Russian oil, and its alleged role in aiding Moscow. China, through its foreign ministry spokesman, Guo Jiakun, has expressed a desire for cooperation "on the basis of equality, respect and mutual benefit" to "strengthen cooperation and promote the stable, healthy and sustainable development of Sino-US relations"

1.1.5 Japan and South Korea Drive Semiconductor Resurgence with AI- Focused Investments

Japan has launched an ambitious "economic security" strategy, pledging significant investments to revitalise its semiconductor industry. Over the next decade, Japan plans to allocate USD $65 billion to enhance domestic chip production capacity, including next-generation chips and quantum computing research and development. A key objective is to support Rapidus, a domestic chipmaker, in achieving mass production of 2-nanometer chips by 2027. However, external factors present challenges: TSMC has reportedly delayed the production start of its second plant expansion in Kumamoto, Japan, from late 2027 to the first half of 2029, citing "local transportation issues." This delay adds a variable to Japan's ambitious self-sufficiency plans.

Concurrently, South Korea's government has formally designated semiconductors as a strategic national pillar. It aims to significantly increase public and private spending on chips, clean energy, and digital infrastructure by 2030, with a strong emphasis on AI-driven growth. South Korean companies have demonstrated exceptional prowess in the high-bandwidth memory (HBM) market, which is critical for AI. Companies like SK hynix are particularly leveraging surging AI demand to solidify their market position. South Korea has also actively advocated for greater global cooperation in the semiconductor sector at forums such as the G7, seeking to consolidate its leadership in memory chip technology.

1.2 Economic Indicators

1.2.1 Global Manufacturing Cautiously Stabilises at 50.3, Yet Regional Disparities Shape Semiconductor Demand Outlook

The latest Manufacturing Purchasing Managers' Index (PMI) data for June 2025 provides critical insights into the global economic landscape impacting the semiconductor industry. The Global Manufacturing PMI registered 50.3, marking a critical return to expansion after two consecutive months of slight contraction. This modest global stabilisation suggests a potential bottoming out of the broader manufacturing slowdown, offering a cautious positive signal for overall end-product demand, which could translate into a gradual uptick in order growth for general-purpose semiconductor components.

However, regional PMIs reveal a deeply divergent outlook. Major Asian manufacturing hubs continue to show mixed signals. While China's PMI (49.7) showed a marginal improvement, it remained in contraction for the third consecutive month, indicating persistent subdued activity in the world's largest manufacturing base. Similarly, South Korea's PMI (48.7) continued its contraction, signaling ongoing challenges for this semiconductor powerhouse. In contrast, Japan's PMI (50.1) edged back into expansion, offering a glimmer of recovery, while India's PMI remained robust at 58.4, underscoring strong and continued expansion driven by robust domestic demand and growing manufacturing capabilities. In developed markets, the picture is also varied. The Americas' PMI (49.0), largely reflecting the US, continued to contract but at a slower pace, suggesting an easing of the downturn. More encouragingly, the Eurozone PMI (50.5) returned to expansion, indicating a positive shift after a prolonged period of manufacturing weakness.

These varied manufacturing signals present a nuanced picture for the semiconductor industry. The return to expansion in global manufacturing (albeit slight) and in key regions like the Eurozone and Japan is a positive development, potentially alleviating some pressure on commoditised chip segments. As manufacturing output increases globally, demand for a wide range of semiconductors, from microcontrollers to analog ICs and power management units, is likely to see a gradual improvement. However, the persistent contraction in major electronics manufacturing and consumption hubs like China and South Korea indicates that a broad-based, strong recovery in demand for all chip types may still face headwinds.

For semiconductor companies and their purchasers, the June 2025 PMI data underscores the importance of a region-specific and segment-specific approach. While the overall macro environment appears to be stabilising, the varying health of key end-markets will dictate the pace and nature of semiconductor demand recovery across different product categories. Strategic planning will need to account for robust demand in growing markets like India, cautious stabilisation in the US and Eurozone, and continued challenges in major Asian manufacturing bases.

Global Manufacturing by Region PMI

Period	Global	China	Japan	Korea	India	Americas	Eurozone
2024-01	50.00	49.20	48.00	51.20	56.50	49.10	46.60
2024-02	50.30	49.10	47.20	50.70	56.90	47.80	46.50
2024-03	50.60	50.80	48.20	49.80	59.10	50.30	46.10
2024-04	50.30	50.40	49.60	49.40	58.80	49.20	45.70
2024-05	50.90	49.50	50.40	51.60	57.50	48.70	47.30
2024-06	49.50	49.50	50.00	52.00	58.30	51.70	45.60
2024-07	49.80	49.40	49.10	51.40	58.10	46.80	45.80
2024-08	48.90	49.10	49.80	51.90	57.50	47.20	45.60
2024-09	48.80	49.80	49.70	48.30	56.50	47.20	45.00
2024-10	48.80	50.10	49.80	48.30	57.50	46.50	46.00
2024-11	50.00	50.30	49.00	50.60	56.50	48.40	45.20
2024-12	49.60	50.10	49.60	49.00	56.40	49.20	45.10
2025-1	50.10	49.10	48.70	50.30	57.70	50.90	46.60
2025-2	50.60	50.20	49.00	49.90	56.30	50.30	47.60
2025-3	50.30	50.50	48.40	49.10	58.10	49.00	48.60
2025-4	49.80	49.00	48.70	47.50	58.20	48.70	49.00
2025-5	49.60	49.50	49.40	47.70	57.60	48.50	49.50
2025-6	50.30	49.70	50.10	48.70	58.40	49.00	50.50

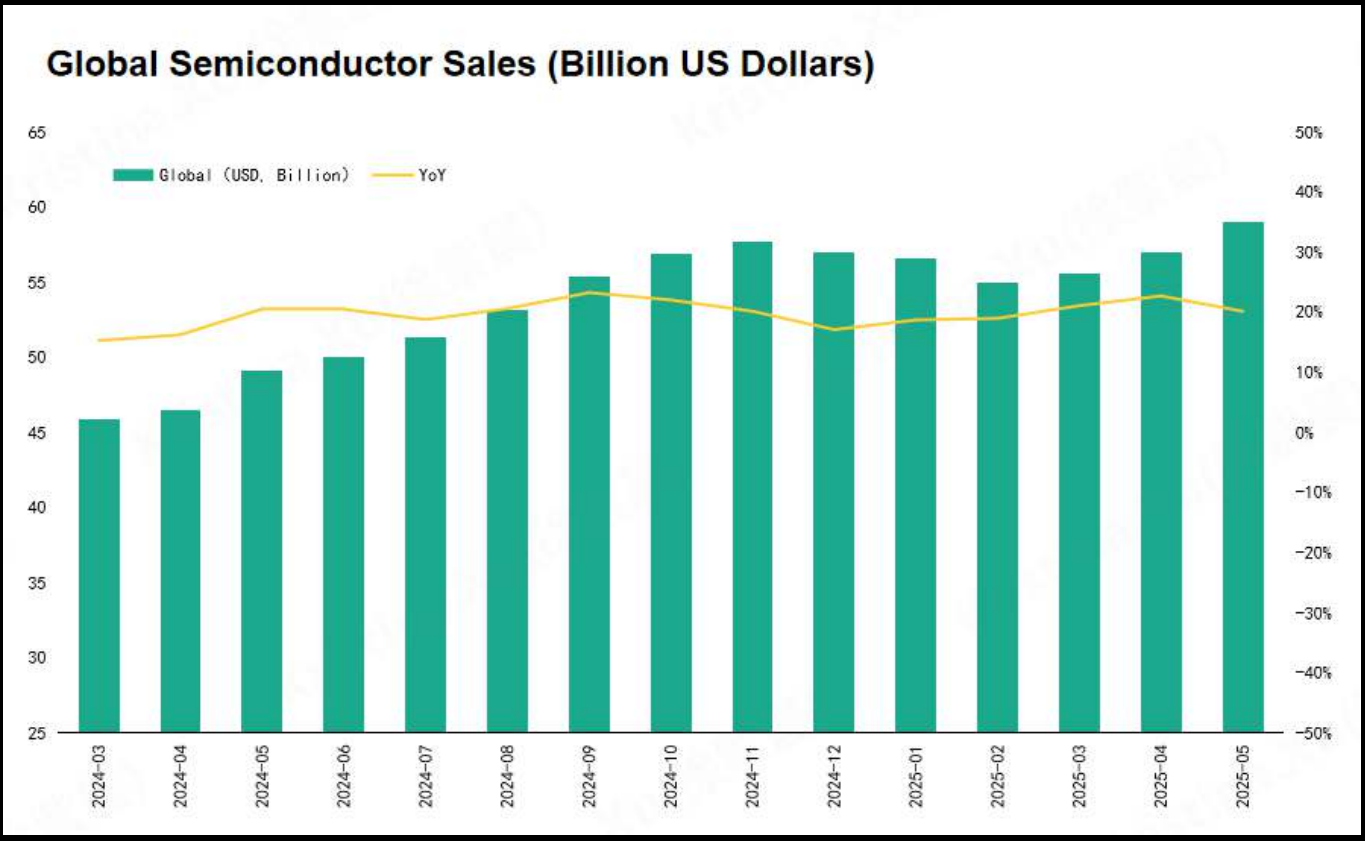
Source : Wind

1.2.2 Global Semiconductor Sales Sustain Strong Growth Momentum in May 2025, Led by Americas and Asia Pacific

Global semiconductor sales continued their robust growth trajectory in May 2025, reaching a new high of USD 58.98 billion. This figure represents an impressive 20.1% increase compared to May 2024, extending a period of substantial year-over-year expansion for the industry and marking the highest monthly sales recorded in the provided series. This sustained double-digit growth underscores a resilient and expanding demand environment for semiconductors.

Regionally, the growth was particularly strong. Year-to-year in May, sales surged in the Americas (45.2%) and Asia Pacific/All Other (30.5%), with China also posting solid growth (20.5%). Japan (4.5%) and Europe (4.1%) saw more moderate year-over-year increases, yet still positive. On a month-to-month basis, sequential growth was observed across all regions, led by Asia Pacific/All Other (6.0%) and China (5.4%), followed by Europe (4.0%), the Americas (0.5%), and Japan (0.2%).

For purchasers and stakeholders within the electronics manufacturing sector, these strong and regionally diverse sales figures signal a healthy demand landscape for critical components. The widespread growth, especially in key markets like the Americas and Asia Pacific, reinforces the positive momentum. This robust performance is likely to influence lead times and pricing dynamics for various semiconductor products, underscoring the need for strategic sourcing and proactive supply chain management.



Source：SIA

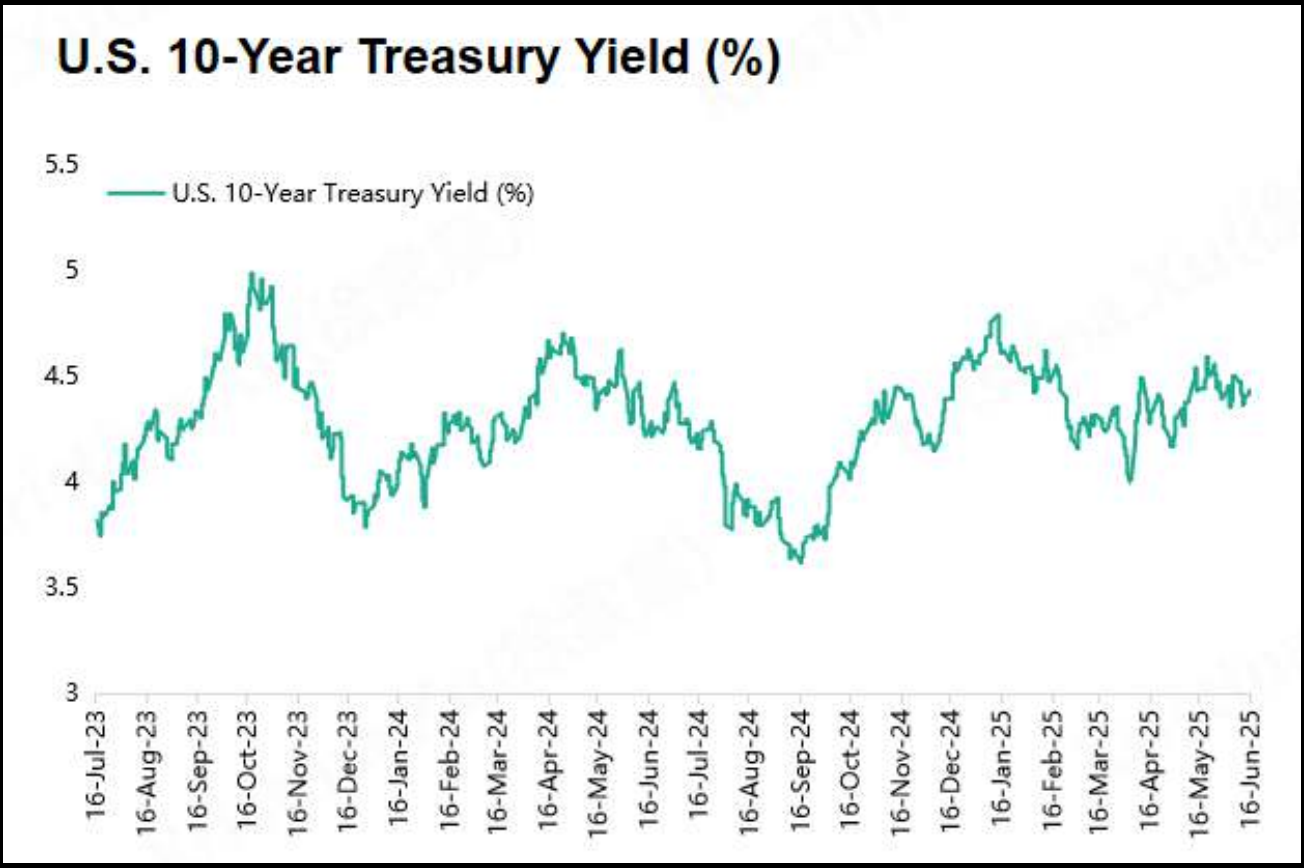
1.2.3 US 10-Year Treasury Yields: Navigating Elevated Levels and Volatility in June/July 2025

The US 10-Year Treasury Yield demonstrated a period of elevated levels and notable volatility throughout June and into July 2025. Following a peak of around 4.7% in mid-May, yields generally fluctuated within a range of 4.1% to 4.5% for much of June. A notable dip occurred towards the end of June and beginning of July, with yields touching approximately 4.1%. However, this was followed by a subsequent rebound in mid-July, pushing yields back towards the 4.4% range by 22 July.

From a broader historical perspective, these levels remain significantly higher than the troughs observed in early 2024 (around 3.8%) and mid-2024 (around 3.7%). While below the peak of nearly 5% seen in late 2023, the sustained presence of yields above 4% reflects ongoing market expectations regarding inflation, economic growth, and the Federal Reserve's monetary policy stance. The volatility within this range suggests market participants are actively recalibrating their outlooks based on incoming economic data and central bank communications.

For the semiconductor and electronics manufacturing industries, these elevated and fluctuating 10-Year Treasury Yields carry several implications. Higher benchmark yields translate to increased borrowing costs for corporations, potentially impacting financing for capital-intensive projects such as new fab construction, R&D initiatives, and equipment upgrades. This can influence strategic investment decisions for both chipmakers and their electronics manufacturing customers.

Furthermore, sustained higher yields can make fixed-income investments more attractive relative to equities, potentially affecting valuations and investor sentiment within growth-oriented technology sectors like semiconductors. While a strong economy leading to higher yields could also imply robust end-demand for electronics, the cost of capital remains a critical factor in a capital-intensive industry.



Source : Investing

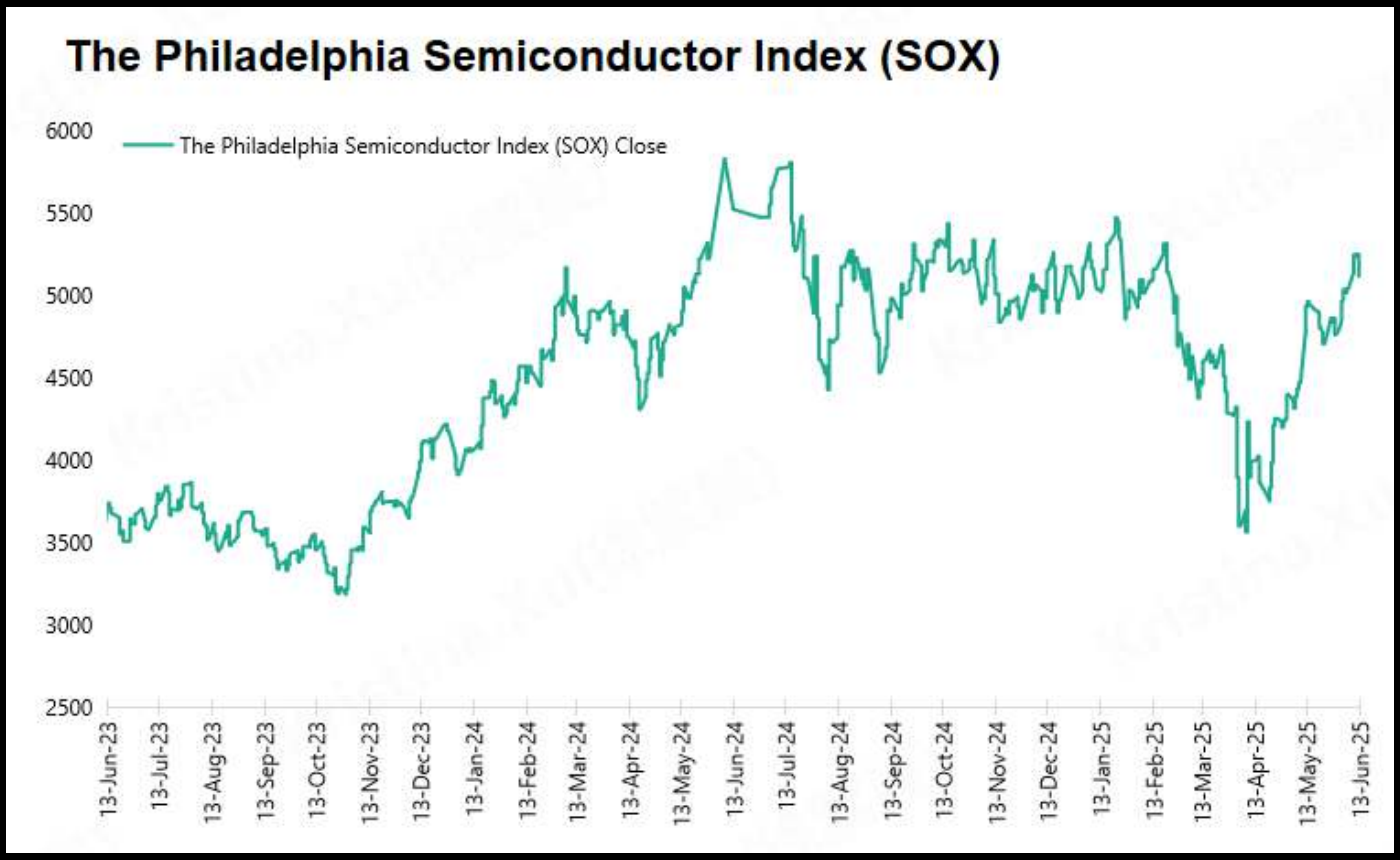
1.2.4Philadelphia Semiconductor Index (SOX): Sustained Rally into June and July 2025 Signifies Robust Investor Confidence

The PHLX Semiconductor Index (SOX), a key barometer for the semiconductor industry, exhibited remarkable strength and a clear upward trajectory through June and into mid-July 2025.

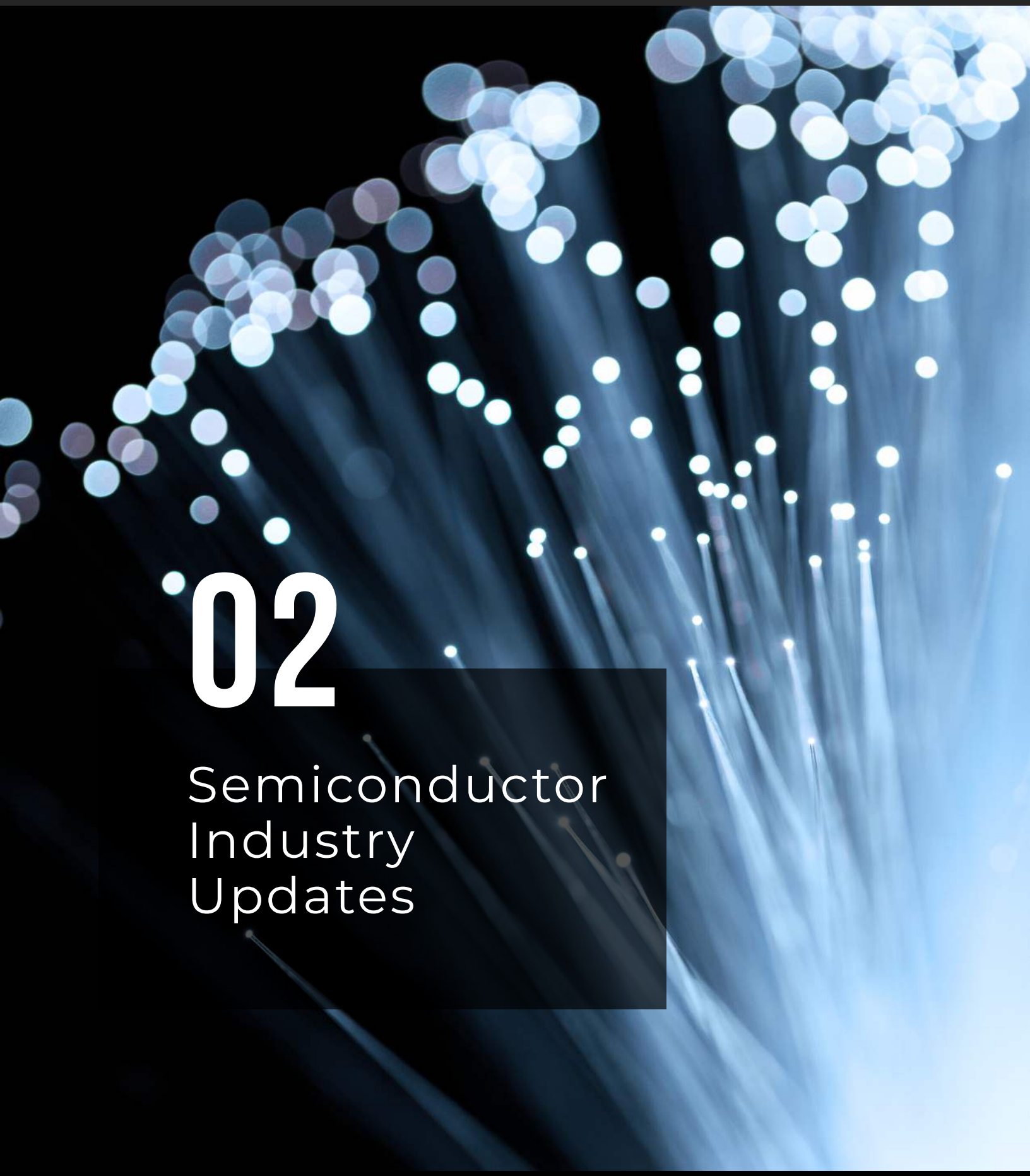
Following a May average of 4,690.77, the SOX surged to an average of 5,208.91 in June, representing a significant month-over-month increase. This upward momentum continued into July, with the index averaging 5,629.49 by July 14, reaching new highs in the process.

Throughout June, the SOX index saw a consistent ascent, beginning the month below 5,000 and concluding it above 5,500. This rally persisted into July, with the index climbing past 5,600 and touching new peaks, demonstrating strong investor confidence in the sector. This performance aligns well with the strong global semiconductor sales data for May 2025, which showed a robust 20.1% year-over-year growth, indicating tangible demand supporting the market's optimism.

The sustained rally in the SOX index reflects several contributing factors. Dominant among these is likely the insatiable demand for high-performance chips driven by Artificial Intelligence (AI) acceleration, cloud computing, and advanced automotive applications. This robust SOX performance signals a healthy market environment for semiconductor firms, potentially facilitating capital raising and strategic investments, and suggests continued strong demand for components for electronic manufacturers.



Source : MacroMicro



02

Semiconductor Industry Updates

Semiconductor Industry Updates

Impact	Manufacturer	Updates	Analysis
Short-term	NVIDIA AMD	U.S. Approves Sales of H20 GPU and MI308 AI Chips to China, Easing China's Arithmetic Shortage	Following a partial easing of U.S. export restrictions, NVIDIA and AMD's AI chips have re-entered the Chinese market, providing short-term relief to China's AI computing capacity gap. Nonetheless, the drive for domestic alternatives remains robust and continues to accelerate.
Short-term	Micron Samsung SK hynix	Micron Pressured by HBM Competition and DDR4 Phase-Out Disruptions	Micron's share price has declined amid intensifying competition in the HBM market, where SK Hynix and Samsung have gained stronger pricing power. Simultaneously, the industry-wide phase-out of DDR4 production has triggered a spike in spot prices, longer lead times, and growing market uncertainty.
Short-term	Broadcom	Shares Dropped 3.34% on July 22 Amid Investor Concerns Over VMware's Ongoing Service Maintenance and Revisions to Its Partner Ecosystem	Short-term market sentiment was disrupted by uncertainties stemming from VMware's service maintenance and the transition to a new partner programme. However, the company's AI-dedicated chip business remains strong and continues to demonstrate solid momentum.
Short-term	TI	TI Lowered Its Revenue Guidance for Q3 of Fiscal Year 2025, Causing Its Share Price to Plunge More Than 11% in After-Hours Trading	Weaker-than-expected recovery in automotive and industrial demand led to a conservative earnings outlook, fueling investor concerns over the sustainability of end-market demand.
Short-term	TSMC	TSMC Q2 Net Profit Surges 61% YoY; 2nm Process to Enter Mass Production in 2H 2025 with Monthly Capacity Target of 100,000 Wafers by 2026	TSMC will begin mass production of its 2nm process in the second half of 2025, with plans to scale up to 100,000 wafers per month by 2026. The ramp-up is expected to support strong demand in AI and high-performance computing (HPC), despite ongoing geopolitical and competitive pressures.

Impact	Manufacturer	Updates	Analysis
Mid-term	Microchip	Microchip Signs SiC Power Management Partnership with Delta Electronics	The two companies will jointly develop silicon carbide (SiC) power devices targeting markets such as electric vehicles and industrial power systems, accelerating the deployment of next-generation power solutions.
Mid-term	Renesas	Renesas Launches New 650V/1200V SiC Schottky Diodes	Renesas has expanded its high-voltage SiC Schottky diode portfolio to enhance performance in high-frequency, high-efficiency power designs, strengthening its competitiveness in the industrial power market.
Mid-term	ADI	ADI Leads Formation of OpenGMSL Automotive Connectivity Alliance	Built on ADI's GMSL (Gigabit Multimedia Serial Link) technology, the alliance aims to establish open standards for in-vehicle video and data transmission— benefiting ADAS and automotive infotainment systems.
Mid-term	Marvell	Marvell Partners with TSMC to Co-Develop Sub-3nm AI ASICs and Silicon Photonics	The collaboration focuses on long-term development of AI custom chips and high-speed interconnect infrastructure. However, Marvell faces ongoing competition from major players like NVIDIA and AMD.
Long-term	SK hynix	SK Hynix's DRAM Shipments Surpass Samsung in Q1 2025; Announces HBM4/HBM4E Plans	Leveraging strong AI demand and leadership in HBM technology, SK Hynix continues to expand market share and reinforce its position as an industry leader in high-bandwidth memory.

Impact	Manufacturer	Updates	Analysis
Long-term	Samsung	Samsung Breaks Yield Barrier for Sixth-Generation 10nm-Class DRAM; Plans Mass Production of Sixth-Generation HBM4 in H2 2025	By accelerating HBM4 development through advanced DRAM process technology, Samsung aims to close the gap with competitors and strengthen its foothold in the AI high-bandwidth memory market.

2. Semiconductor Industry Updates

2.1 Short-term Implications

2.1.1 NVIDIA & AMD: U.S. Eases AI Chip Export Restrictions, Alleviating China's AI Computing Shortage

In July 2025, the U.S. government approved the sale of NVIDIA's H20 GPUs and AMD's MI308 AI chips to China, marking a partial relaxation of semiconductor trade policies between the two countries. In the short term, this policy shift will effectively ease the shortage of AI computing power faced by Chinese AI server manufacturers, especially in AI inference and training. However, the trend of domestic substitution continues to accelerate, with Chinese chips such as Huawei's Ascend and Cambricon maturing rapidly. This may gradually reduce China's dependence on foreign AI chips. TrendForce forecasts that China's AI chip import ratio will rebound to 49%, still below pre-ban levels. In the long run, the push for indigenous AI chips is irreversible and may further reshape the global AI chip market landscape.

2.1.2 Micron Faces Stock Decline Amid HBM Price War and DDR4 Phase- Out Effects

On July 22, 2025, Micron's stock hit a recent low due to fierce competition in the high-bandwidth memory (HBM) market. The ongoing HBM price war has empowered competitors like SK Hynix with greater pricing power, intensifying margin pressures on Micron, especially with expected HBM price declines in 2026. Additionally, Micron is impacted by the industry-wide DDR4 phase-out, with DDR4 spot prices surging to $5 in July 2025—a 200% increase since April. This supply-demand imbalance has extended lead times in industrial and embedded sectors to 40 weeks, with module makers like ADATA delaying orders to September. The resulting price volatility and supply chain tightness have placed significant market pressure on Micron, dampening investor sentiment. To counter this, Micron must leverage technological innovation and cost control to stabilise its position in the memory market.

2.1.3 Broadcom Shares Drop 3.34% on July 22, Affected by VMware Maintenance and Partner Programme Changes

Broadcom's stock declined 3.34% on July 22, 2025, triggered by service maintenance issues with VMware Tanzu CloudHealth and the announcement of a new partner programme to be implemented by October 2025. The programme involves reducing partner numbers and terminating some white-label projects, raising market concerns about Broadcom's future partner relationships and causing short-term stock volatility. However, analysts note that despite temporary uncertainties, Broadcom remains a leader in AI custom ASIC chips, supplying customers like Google and Amazon, with significant long-term growth potential. Overall, this pullback is viewed as a market reaction to strategic adjustments, with Broadcom's strong AI chip business providing a foundation for stock recovery.

2.1.4 Texas Instruments Lowers FY2025 Q3 Revenue Guidance, Shares Plunge Over 11% After Hours

On July 22, 2025, Texas Instruments (TI) issued a Q3 revenue forecast of $4.45 billion to $4.8 billion. Although this range includes analyst estimates of $4.57 billion, it fell short of broader market optimism. The cautious outlook reflects concerns about a slower-than-expected recovery in automotive and industrial chip demand. Consequently, TI's stock dropped more than 11% in after-hours trading. TI's CEO acknowledged that "automotive business has yet to recover," highlighting the automotive market's softness as a drag on revenue. While the near-term revenue outlook pressures the stock, TI is expected to benefit from structural demand for analog and industrial chips over the long term, albeit after navigating the current cyclical downturn.

2.1.5 TSMC Q2 Net Profit Surges 61% YoY; 2nm Process Mass Production to Begin in 2H 2025, Monthly Capacity to Expand to 100,000 Wafers by 2026

TSMC's net profit grew 61% year-over-year in Q2 2025, with sub-7nm processes contributing 74% of revenue. The company plans to start mass production of its 2nm process in the second half of 2025 and scale capacity to 100,000 wafers per month by 2026. This will further consolidate TSMC's leadership in AI and high-performance computing (HPC). Despite short-term advantages, increasing competition from Samsung and Intel, along with geopolitical risks, pose challenges to TSMC's market dominance.

2.2 Mid-term Implications

2.2.1 Microchip and Delta Electronics Sign SiC Power Management Partnership

In July 2025, Microchip announced a collaboration with Taiwan's Delta Electronics to jointly develop silicon carbide (SiC) power device solutions. Combining Microchip's mSiC™ technology with Delta's power supply expertise, the partnership targets improved SiC power management efficiency for electric vehicles and renewable energy applications. This collaboration accelerates the practical adoption of SiC technology and holds significant strategic value. With growing demand in new energy vehicles and power electronics, the SiC device market potential is substantial. By partnering with a power industry leader, Microchip aims to rapidly expand its SiC product portfolio and customer base, driving mid-term growth.

2.2.2 Renesas Launches New 650V/1200V Third-Generation SiC Schottky Diodes

Renesas introduced new 650V and 1200V third-generation SiC Schottky diodes that improve efficiency in high-frequency hard-switching circuits. These devices are widely used in power electronics, industrial drives, and new energy vehicles. The launch strengthens Renesas' competitiveness in the high-voltage power semiconductor market, particularly in the rapidly expanding electric vehicle segment.

2.2.3 ADI Leads Formation of OpenGMSL Automotive Connectivity Alliance

On June 4, 2025, ADI (Analog Devices), alongside multiple automakers, Tier 1 suppliers, and chip vendors, announced the formation of the OpenGMSL alliance. Based on ADI's leading GMSL (Gigabit Multimedia Serial Link) technology, the alliance aims to standardise automotive video and high-speed data transmission. Members include Chinese automaker Human Horizons, ZF, Hyundai Mobis, Amphenol, Keysight, and other industry leaders. This collaboration will accelerate innovation in advanced driver-assistance systems (ADAS) and in-vehicle infotainment by enabling OEMs and suppliers to adopt unified, low-latency transmission solutions. Industry experts believe OpenGMSL will break down "ecosystem barriers" between vendors, foster interoperability, reduce costs, and speed up deployment of autonomous driving applications. For ADI and other founders, this effort will cement their leadership in automotive imaging and connectivity technologies, with far-reaching impact on the future automotive electronics market.

2.2.4 Marvell Partners with TSMC to Develop Sub-3nm AI Custom ASICs and Silicon Photonics

Marvell is collaborating with TSMC to develop AI custom ASICs using sub-3nm processes and to explore integrated silicon photonics technology to enhance data center and optical communication infrastructure efficiency and performance. While this marks Marvell's forward-looking investment in high-speed interconnects and AI compute chips, the company faces stiff competition from NVIDIA and AMD in the custom AI chip market. As demand for AI infrastructure grows, Marvell's strategy will be key to its positioning within future high-performance cloud computing ecosystems.

2.3 Long-term Implications

2.3.1 SK Hynix Surpasses Samsung in Q1 2025 DRAM Shipments, Announces HBM4/HBM4E Plans

Counterpoint Research data shows that in Q1 2025, SK Hynix captured 36% of the global DRAM market, overtaking Samsung's 34% share for the first time and becoming the new leader. This achievement is largely attributed to its leading high-bandwidth memory (HBM) technology. SK Hynix currently holds a 70% share in the HBM segment and supplies AI giants like NVIDIA with its latest fifth-generation HBM3E chips. Looking ahead, SK Hynix plans to launch sixth-generation HBM4 (with 12-layer stacks) and seventh-generation HBM4E, targeting mass production of 12-layer HBM4 in the second half of 2025. Long term, SK Hynix is reinforcing its AI memory market leadership through continuous technology investment and rapid scaling.

2.3.2 Samsung Breaks Yield Barrier for Sixth-Generation 10nm-Class DRAM, Plans Mass Production of Sixth-Generation HBM4 in H2 2025

According to TechNews, Samsung recently achieved over 50% yield for its 10nm-class sixth-generation DRAM (codename "1c") and plans to introduce sixth-generation HBM4 memory, starting mass production in the second half of 2025. The 1c process node corresponds to 11-12nm, offering higher density and lower power consumption than current mainstream DRAM, suitable for stacking more layers in HBM4 chips.

Reports note Samsung's previous supply of HBM3E to AMD failed NVIDIA's testing, limiting market share. To turn the tide, Samsung is accelerating 1c process development, integrating self-developed 4nm logic chip manufacturing, and planning "custom HBM4" solutions for different applications. Overall, Samsung's efforts signal an accelerated push into high-end memory, which if successful, could reshape its competitive position in the AI accelerator market.

03

Application Updates

3. Application Updates Overview

Category	Section	Manufacturer	Updates
Artificial Intelligence	AI Chip	TSMC	Q2 performance exceeds expectations, revenue up 39%, overseas expansion worth billions underway
Artificial Intelligence	Cloud Computing & Big Data	HUAWEI	Released PanGu large model 5.5 and established a 150 million incentive fund
New Energy	Photovoltaics & Energy Storage	Tesla	CATL Subsidiaries, China FAW, and Partners Sign Agreement to Build Hong Kong Battery Swap Network
New Energy	New Energy Vehicles	CATL & AITO	CATL's factory model launched in Chongqing, specialising in supplying power batteries for AITO
Consumer Electronics	Smartphones	Apple Inc	Launched in the Saudi market, first offline retail store to open next year
Consumer Electronics	Robotics	Unitree	Preparing for IPO, aiming to be the first "unicorn" in quadruped robots
Industrial	Industrial Automation & Control	Schneider	Beijing AI Innovation Lab opened, China's only global full-service R&D base
Automotive	Automotive Supply Chain	Volkswagen	Invested another 2.5 billion euros; Hefei plant transformed into "Global Electric Vehicle Flagship Factory"

Category	Section	Manufacturer	Updates
Telecommunications	Communication Networks & Optical Fiber	China Telecom	Invested 2 billion RMB in the Yunnan Postal Data Center — first phase completed; 300P computing power will support external services
Medical Equipment & Devices	Medical Imaging Equipment	Zimmer Biomet	Acquired Monogram Technologies for $177 million, strengthening surgical robotics deployment

3.1 Artificial Intelligence

3.1.1 Intel announces massive global layoffs, cancels two EUR 10 billion wafer fabs in Germany and Poland

On July 24, Intel's new CEO Justin Chen announced that due to a USD 2.9 billion Q2 loss, the company is officially canceling its EUR10 billion wafer fab projects in Germany and Poland. Simultaneously, Intel will initiate global layoffs, reducing its workforce from 96,000 to 75,000 by year-end. The move aims to lower operating expenses to USD17 billion by 2025. Intel will also delay its Ohio fab construction and focus resources on its 18A process and AI chips, declaring, “We will no longer write blank checks.”

3.1.2 Huawei Cloud releases Pangu 5.5 large model, announces CNY 150 million ecosystem incentive fund

Huawei Cloud launched the “Pangu 5.5” large model, covering five core domains with 8x improved inference efficiency. The model is now in public beta for industries like finance, manufacturing, and government. To grow its partner ecosystem, Huawei Cloud also introduced a CNY 150 million incentive plan, focusing on Ascend AI services, GaussDB databases, and three other key areas.

3.2 New Energy

3.2.1 Tesla invests CNY 4 Billion to build its first grid-scale energy storage plant in China

On June 20, Tesla signed an agreement with the Lingang New Area in Shanghai to build its first grid-side gigawatt-scale energy storage plant in mainland China—the Lingang Grid-Forming Zero-Carbon Energy Demonstration Center. The facility will use Megapack systems made at Tesla’s Shanghai Megafactory. The first phase (300 MWh) is scheduled to connect to the grid in 2025. Once operational, it will support peak shaving, frequency regulation, and spot electricity trading in East China, supplying one hour of emergency power annually to 360,000 households.

3.2.2 CATL's "factory-in-a-factory" model launches in Chongqing to supply batteries for AITO vehicles

On June 30, CATL began production on two CTP 2.0 high-end battery pack lines inside SERES' super factory. This is CATL's first Chongqing facility and first implementation of its "factory-in-a-factory" model, where production lines are embedded directly in vehicle assembly plants for 20-minute supply chain responsiveness. The plant exclusively supplies AITO models and has supported over 700,000 vehicles. The two firms will also collaborate on R&D, new materials, and zero-carbon intelligent manufacturing.

3.3 Consumer Electronics

3.3.1 Apple enters Saudi market, first physical store to open in 2026

On July 21, MacRumors reported that Apple officially launched its online store in Saudi Arabia, enabling local customers to purchase the full range of Apple products with Arabic language support for the first time. Apple plans to open multiple retail stores from 2026, with the first flagship location set to open in Diriyah, near Riyadh.

3.3.2 Unitree Robotics submits IPO filing, eyes title of "first quadruped robot stock"

On July 18, Hangzhou-based Unitree Robotics submitted IPO guidance materials to the Zhejiang Securities Regulatory Bureau, officially kicking off its public listing process. The company aims to become China's first listed quadruped robot firm. Unitree, a globally recognised developer, generated over CNY 1 billion revenue in 2024 and has been profitable for five consecutive years. It plans to list on the STAR Market, focusing on quadruped robotics.

3.4 Industrial

3.4.1 Schneider Electric opens AI Innovation Lab in Beijing Yizhuang, China becomes its only all-business R&D base

On July 7, Schneider Electric inaugurated its AI Innovation Lab in Beijing Yizhuang, housing over 350 AI specialists. The lab focuses on AI algorithms for industrial automation, smart buildings, and green data centers, aiming to cut R&D time by 30% and validation costs by 40%. EVP Yin Zheng stated China is now Schneider's only country with full-scope R&D capabilities, and the lab will further empower global innovation from China.

3.5 Automotive

3.5.1 Volkswagen invests EUR 2.5 billion more in Hefei to make it a global EV flagship base

Volkswagen Group announced an additional EUR 2.5 billion investment to expand its Hefei base in Anhui, China. The expansion targets MEB+ and CMP platforms and next-gen smart EVs, boosting capacity to 1 million units by 2026. The facility will also house battery, e-drive, and software R&D centers. VW said Hefei will become its largest EV production and export hub outside Wolfsburg, with new models bound for Europe and Southeast Asia by 2027.

3.6 Communication

3.6.1 China Telecom completes Phase 1 of Poyang Lake AI data center, 300P compute power goes live

On July 8, China Telecom announced the completion of Phase 1 of Jiangxi's first provincial AI compute hub—the Poyang Lake Intelligent Computing Center, with 300P compute capacity. Public service begins mid-July. The ¥2B project includes one intelligent cloud center, one shared compute platform, one AI demo center, and multiple industry-specific solutions. With 2,960 racks installed, the center is expected to scale up to 2,500P. It also launches Jiangxi's first compute dispatch platform "Xirang," already signed to serve universities, hospitals, and AI enterprises.

3.7 Medical Equipment & Devices

3.7.1 Zimmer Biomet acquires Monogram Technologies for $177M, expands surgical robot portfolio

On July 14, orthopedic giant Zimmer Biomet announced a $177 million acquisition of Monogram Technologies, a company specialising in semi- and fully-autonomous robotic surgery systems. Monogram's AI-powered, CT-based total knee replacement system was FDA-approved in March. Zimmer plans to integrate Monogram's products into its robotic portfolio, with plans to launch fully autonomous robots and joint replacement applications before 2027.

04

Product Updates

4. Product Updates

4.1 Memory Chips

4.1.1 DRAM prices surge across the board; DDR4 posts the largest single- month increase in a decade

Storage Chip Market Key Movements (Jun–Jul 2025)

Product Category	Model	Price Trend	Lead Time (Weeks)	Supply-Demand Status
DDR4	8GB	Rising	Not specified	Short Supply
DDR5	16GB	Rising	Not specified	In Equilibrium
NAND Flash	128GB	Rising	6-10	Short Supply
eMMC	32GB	Rising	8-12	Some Constraints
HBM	HBM3E	Rising	52+	Some Constraints

Source: Data compiled from publicly accessible online data

Prices are rising across all product categories, with DDR4 (+50% YoY) and HBM (+10% YoY) leading the gains.

DDR4: The three major suppliers are phasing out older products faster than expected. Samsung stopped accepting DDR4 chip orders in June 2025 and plans to complete final module shipments by mid-December. SK hynix expects to stop taking orders by October and cease shipments by April 2026. Micron notified customers of production termination in early June and will gradually stop supply in Q1 2026. Some DDR4 spot prices surged over 100% in June.

DDR5: All three major suppliers have shifted production capacity to DDR5. Demand is steadily rising, driven by new platforms such as AI PCs and servers, leading to moderate price increases.

NAND Flash: Suppliers have jointly reduced production. Contract prices are expected to rise 5–10% in Q3 2025. Lead times have extended to 6–10 weeks, with continued depletion of channel inventory.

eMMC: Small-capacity (32GB and below) supply is tight due to the discontinuation of MLC production, pushing prices up across the board. Large-capacity (64GB and above) supply remains relatively stable, with lead times of 8–12 weeks.

HBM: SK hynix's HBM3E capacity is fully booked through the end of 2025, while Micron is accelerating capacity expansion. Lead times exceed 52 weeks, with annual price increases of 5–10%, driven primarily by AI chip demand.

4.1.2 Memory Market Trends

Supply Bottlenecks: DRAM production is shifting toward HBM and DDR5, causing significant shortages in traditional DDR4 and low-capacity NAND.

Domestic Breakthroughs: CXMT (ChangXin Memory) is gaining share in DDR4, but the three major players still dominate the DRAM/NAND market with over 90% share.

4.2 GPU

4.2.1 AI demand drives advanced capacity expansion, with NVIDIA commanding over 70% of industry capacity

GPU Market Key Movements (Jun–Jul 2025)

Product Category	Model	Price Trend	Lead Time (Weeks)	Supply-Demand Status
Consumer - Gaming & Personal Use	RTX 5090	Rising	4-6	Short Supply
AI Training Card	H100 SXM5	Stable	20-26	Short Supply
AI Training Card	AMD MI300X	Falling	12-16	Easing
Edge Inference	A100 PCIe 80GB	Rising	8-12	Short Supply
China Substitute	Moore Threads MTT S80	Falling	2-4	Balanced

Source: Data compiled from publicly accessible online data

AI Training Cards: NVIDIA H100 lead times extend up to six months, with large-scale orders from Amazon and Meta squeezing supply for small and medium enterprises; AMD's MI300X has lowered prices to capture market share, but software ecosystem gaps still limit its share growth.

Gaming & Personal Use GPUs: RTX 5090 improves power efficiency by 50%, but TSMC's CoWoS packaging capacity shortages cause spot market premiums of about 40%.

Edge and Domestic Products: The edge inference card A100 is a “hard currency” item, with second-hand market prices rising 120% over two years despite market headwinds; domestic GPUs from manufacturers like Moore Threads and Biren have increased their share in government and enterprise markets to 15%, but remain at a disadvantage in gaming and AI scenarios.

4.2.2 GPU Market Trends

NVIDIA Hegemony vs AMD Breakthrough: NVIDIA’s H100 continues to dominate, with global AI infrastructure expansion driving explosive demand; the H100 system price holds steady around USD 35,000. AMD is aggressively cutting prices, with the MI300X system price dropping to USD 28,000 and opening the ROCm ecosystem to attract long-tail customers, but software compatibility gaps still restrict significant market share gains.

Supply Chain Competition: Capacity, Sanctions, and Ecosystem: Capacity allocation is unbalanced. TSMC’s CoWoS packaging monthly capacity is only 400,000 units, of which 70% is locked by NVIDIA GB200/H200, while AMD MI350 receives only 8%. SK Hynix’s HBM3e supply prioritises NVIDIA, resulting in AMD’s lead times being passively extended by 30%.

4.3 MCU

4.3.1 Demand growth in new energy vehicles and other sectors drives price increases and shortages of automotive-grade MCU chips

MCU Market Key Movements (Jun–Jul 2025)

Product Category	Model	Price Trend	Lead Time (Weeks)	Supply-Demand Status
8-bit Basic MCU	NXP S9S08PA NXP S9S08PA	Rising	18-22	In Equilibrium
32-bit General MCU	STMicroelectronics STM32A Texas Instruments TMS570	Rising	24-30	Short Supply
Automotive MCU	Infineon TC4xx NXP S32K3	Rising	30-52	Short Supply
China Substitute MCU	ChipDrive E3 Series	Stable	12-18	In Equilibrium

Source：Data compiled from publicly accessible online data

8-bit MCUs: Prices continue to decline; some general-purpose models face oversupply, with prices down 5%-8% compared to early June. Lead times remain stable, and some distributors are clearing inventory with available stock.

32-bit MCUs: Prices are rising due to sustained demand from automotive-grade and industrial control applications, with an expected 3–5% price increase possible in Q3 2025.

Automotive-grade MCUs: China's new energy vehicle sales reached 887,000 units in June, a 35% year-on-year increase. Orders for automotive MCUs increased 20% month-on-month. Spot prices for automotive-grade MCUs rose 10%-15% month-on-month due to increased demand. Prices of automotive-grade products from NXP, Infineon, and others remain steadily upward. Lead times are long, typically 40-52 weeks.

China Substitute MCUs: To capture market share, Chinese substitute MCUs are priced 10%-20% lower than similar imported products. Prices remained mostly stable from June to July without significant fluctuations. Lead times are shorter, enabling quick market response. Demand is strong in mid-to-low-end markets, but competition is intense, leading to market overcrowding.

4.3.2 MCU Market Trends

Price Trends: DRAM used in automotive MCUs (such as LPDDR4X) is facing supply-demand imbalances and price spikes due to original manufacturers discontinuing production, which is expected to indirectly increase automotive MCU costs in Q3 2025.

China Substitution: Although China’s MCU self-sufficiency rate is less than 15% overall (and below 5% for automotive-grade MCUs), it is rapidly improving. Local manufacturers are quickly entering home appliance and IoT fields, while actively developing high-end automotive-grade applications to fill import gaps.

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